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STUDY OF THE POTENTIAL TRAVEL MARKET FOR CANADA IN THE UNITED STATES

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Prepared for:

Parks Canada
Ottawa
1984

PREFACE

This report was, originally, bound together with a market segmentation analysis of the 1982 visitor survey conducted at Kejimkujik National Park. The Kejimkujik study, which is referred to in the introduction to this report is now contained in a separate report. It's title is: Kejimkujik Visitor Survey: Market Segmentation Analysis. The title of the original report is: Analysis of Two Data Sets: 1.) Kejimkujik Visitor Survey, 2.) Study of the Potential Travel Market for Canada in the United States.

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INTRODUCTION

This report summarizes the analyses of two data sets: 1) Kejimkujik Visitor data set and 2) U.S. Potential Market data set.

Analysis of the Kejimkujik data set consisted of the identification of park user segments in terms of activities engaged in while visiting the park and the benefits sought during the visit. The activity and benefit segments identified are described in the first section of this report.

In the analysis of the U.S. Potential Market data set, three groups of travellers were identified, each of which are defined as prime prospects for one of three Parks Canada product offerings; historic sites, national parks, or resort areas in a wilderness setting. A secondary analysis of this data set segmented three segments with high potential for Parks Canada products based upon perception of Canada relative to other vacation destinations. Results of these analyses are presented in the second section of this report.

STUDY OF THE POTENTIAL TRAVEL MARKET FOR CANADA IN THE UNITED STATES

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STUDY OF THE POTENTIAL TRAVEL MARKET FOR CANADA IN THE UNITED STATES

Background

The study of the potential pleasure travel market conducted in 1982 was commissioned by the Canadian Government Office of Tourism to be used for extensive market planning, particularly regarding identification of promising potential markets. 2,000 residents of the United States, 18 years of age or older, who in the past three years took at least one vacation or pleasure trip one night or longer, of at least the minimum distance to Canada and used commercial accommodation or transportation, were interviewed. This section of the report describes the results of an analysis designed to pinpoint market segments with high potential for Parks Canada products: historic parks, national parks and resort areas in a wilderness setting. A second analysis examines three segments identified in the initial analysis valuing benefits provided to some degree by Parks Canada products in terms of their evaluation of Canada relative to other vacation destinations.

PARKS CANADA PROSPECTS

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PARKS CANADA PROSPECTS

Three groups of potential travellers to Canada which value Parks Canada products were identified based upon past types of vacation areas visited or importance of vacation benefits.

Those travellers who have visited national parks or forests in the past three years comprise the group of prospects for Canada's national parks. Travellers having visited both a resort area and a wilderness area on past vacations are prospects for resort type parks in a wilderness setting. The third group, prospects for Parks Canada historic sites, consists of vacationers specifying hisotric buildings as very important to them when on vacation.

Parks Canada prospects	Total sample
	2,000
	%
National parks	24
Resort parks in wilderness area	11
Historic sites	36

These three groups are profiled in the following pages.

This table provides a brief description of short pleasure trips taken in the past three years by the Parks Canada prospects, and compares the three groups with the total sample.

- Members of the three prospect groups have taken their short pleasure trips in a greater number of different seasons than the average potential traveller.

- Among potential travellers having taken a short pleasure trip, a higher percentage within the three prospect groups have visited Canada.

- The national park and resort/wilderness prospect groups have spent past short trips travelling in a greater variety of types of areas than either the average potential traveller or the historic sites prospect group. A greater percentage of this latter group has visited big cities on past short trips.

PROFILE OF MINIMUM DISTANCE PAST SHORT PLEASURE TRIPS FOR PARKS CANADA PROSPECTS

Seasons in which minimum distance short pleasure trips were taken in past 3 years	Total	VISITED: National park	VISITED: Resort & wilderness area	Historic buildings very important
Total respondents (100%)	2001	477	215	710
	%	%	%	%
Winter	15	15	18	13
Spring	15	15	18	15
Summer	19	23	20	20
Fall	14	16	21	13
None	63	59	59	63
	#	#	#	#
Average number of different seasons in which short pleasure trips occurred in past 3 years among all travellers	0.58	0.64	0.66	0.58
Average number of different seasons in which short pleasure trips occurred in past 3 years among short pleasure trip takers	1.57	1.66	1.85	1.66
Total respondents having taken at least one short pleasure trip (100%)	748	195	89	261
	%	%	%	%
Destination				
U.S.A.	90	88	89	86
Canada	4	7	6	6
Caribbean	2	2	3	2
Mexico	2	2	4	4
Other countries	4	3	1	4
Type of area visited				
Big city	52	51	52	58
Resort area	37	48	77	37
Smaller town	31	48	64	27
Countryside	31	53	63	32
Oceanside	30	36	42	30
Lakes and streams	26	56	68	24
National parks/forests	20	75	50	22
Wilderness area	17	41	74	18
Mountainous area	25	86	57	27
	#	#	#	#
Average number of mentions*	2.7	4.5	5.5	2.8

In the next tables the past vacation trips taken by the three prospect groups are profiled. The following highlights some of the key differences among the prospect groups.

- As with short pleasure trips, a greater percentage of the three prospect groups have visited Canada on past vacation trips.
- Visit to Canada's West (B.C. and Alberta) are higher among the three prospect groups.
- Members of the historic sites prospect group are more likely to have visited Quebec, whereas the resort/wilderness area group favours Nova Scotia somewhat.
- More members of the resort/wilderness prospect group enjoyed Canada's scenery on past vacation trips.
- National park and resort/wilderness area prospects visited a greater variety of areas on past vacation trips.
- National park prospects are more likely to drive to their vacation destinations, and stay in campgrounds and trailer parks.
- Fewer members of the resort/wilderness prospect group stay with friends or relatives while on vacation.
- Members of the resort/wilderness area prospect group are also more likely to have used the services of a travel agent, particularly in arranging a package vacation. This group also travels with friends moreso than the average potential traveller.

PROFILE OF MINIMUM DISTANCE PAST VACATION TRIPS FOR PARKS CANADA PROSPECTS

Seasons in which minimum distance vacation trips were taken in past 3 years	Total	VISITED: National park	VISITED: Resort & wilderness area	Historic buildings very important
Total respondents (100%)	2001	477	215	710
	%	%	%	%
Winter	39	34	40	37
Spring	36	37	42	38
Summer	60	68	63	61
Fall	26	28	30	27
None	9	7	6	8
	#	#	#	#
Average number of different seasons which vacation trips occurred in past three years among all travellers	1.61	1.67	1.75	1.63
Average number of different seasons in which vacation trips occurred in past three years among vacation trip takers	1.77	1.82	1.86	1.79
Total respondents having taken at least one vacation trip	1828	437	202	648
Number of nights away				
Total 4 - 9 nights	55	48	53	50
4 - 6 nights	28	24	28	24
7 - 9 nights	26	24	25	26
10 - 13 nights	28	30	25	26
Total 16+ nights	18	22	22	24
16 - 30 nights	14	17	19	20
30 or more nights	4	5	3	4
	#	#	#	#
Average number of nights away	12.3	13.9	12.7	13.7
Furthest destination				
U.S.A.	72	72	65	68
South-west	27	28	30	25
South-east	24	21	21	22
Florida	16	12	11	13
North-west	7	12	6	7
North-central	5	3	2	4
North-east	9	8	6	11
Hawaii	4	5	7	3
Alaska	1	2	1	1
Canada	5	10	9	7
Caribbean and Bermuda and Bahamas	5	2	3	3
Continental Europe	5	3	5	6
Mexico	4	3	4	5
British Isles	2	2	4	2
Other countries	3	2	1	5

PROFILE OF MINIMUM DISTANCE PAST VACATION TRIPS FOR PARKS CANADA PROSPECTS (cont'd)

	Total	VISITED: National park	VISITED: Resort & wilderness area	Historic buildings very important
Total respondents having travelled to Canada (100%)	96	44	19	49
	%	%	%	%
Canadian destinations				
Atlantic provinces	11	11	16	7
Newfoundland	1	2	5	0
Nova Scotia	3	2	9	2
Prince Edward Island	-	-	-	-
New Brunswick	7	7	2	5
Quebec	22	16	17	26
Ontario	33	27	25	32
Prairies and north	6	9	5	9
Manitoba	4	5	5	6
Saskatchewan	2	4	-	3
Northwest Territories	*	*	-	-
Yukon	-	-	-	-
West	29	38	36	37
Alberta	10	14	17	19
British Columbia	19	24	19	18
What liked about Canada (main mentions)				
Scenery	48	53	66	47
Friendly/nice people	35	29	45	36
Specific points of interest/attractions	17	15	7	15
Clean	16	15	17	17
Fishing/hunting/wilderness activities	12	8	13	6
Different culture	7	8	-	9
Price value/exchange	6	7	10	7
Good accommodation	6	4	8	6
Good restaurants/food	5	2	-	4
Mountains/lakes/streams	5	5	6	2
Weather/climate	5	2	5	9
Nothing liked	1	-	-	-
What not liked about Canada (main mentions)				
Higher prices	12	14	18	19
Climate/weather/colder	6	8	10	7
Not able to speak French	3	-	-	6
People not friendly	3	7	7	3
Nothing disliked	68	65	61	61

Note: small base sizes

PROFILE OF MINIMUM DISTANCE PAST VACATION TRIPS FOR PARKS CANADA PROSPECTS (cont'd)

	Total	VISITED: National park	VISITED: Resort & wilderness area	Historic buildings very important
Total respondents having taken at least one vacation trip (100%)	1828	437	202	648
	%	%	%	%
Type of area visited				
Big city	51	56	65	56
Smaller town	39	57	70	40
Resort area	38	53	88	38
Oceanside	38	45	60	34
Countryside	32	56	75	35
Mountainous area	29	59	75	32
Lakes and streams	25	56	72	25
National parks/forests	21	88	69	24
Wilderness area	16	45	86	17
	#	#	#	#
Number of mentions	2.9	5.1	6.6	3.0
Type of transportation				
Plane	51	42	47	48
Bus	5	6	6	5
Train	3	2	3	4
Cruise ship	2	1	1	2
Car/truck/van	44	56	46	47
Recreational vehicle	3	4	6	3
Motorcycle	1	1	1	*
	#	#	#	#
Average number of types of transportation used	1.1	1.1	1.1	1.1
Type of accommodation				
Hotel/motel	61	61	66	60
Resort hotel/vacation lodge	3	4	4	3
Tourist home/guest house	1	1	3	2
Rented/commercial cottage/cabin	4	5	5	4
Campground/trailer park	9	17	12	9
Stayed on cruiseship	1	-	*	2
Stayed on road	2	3	3	2
Vacation place owned by family	5	3	4	5
Stayed at friends/relatives	23	21	15	24
Rented apartment/house/condominium	1	*	-	-
	#	#	#	#
Average number of types of accommodation used	1.1	1.2	1.1	1.1

PROFILE OF MINIMUM DISTANCE PAST VACATION TRIPS FOR PARKS CANADA PROSPECTS (cont'd)

	Total	VISITED: National park	VISITED: Resort & wilderness area	Historic buildings very important
Total respondents having taken at least one vacation trip (100%)	1828	437	202	648
	%	%	%	%
Travel agent involvement				
For vacation package	14	13	22	15
For accommodation and transportation	8	5	5	6
Only for accommodation	3	3	3	3
Only for transportation	14	12	14	15
For none of the above arrangements	62	67	56	61
Did work related business				
Yes	9	6	8	9
No	91	94	92	91
Composition of travel party				
Alone/by yourself	16	13	12	17
With family	64	62	52	63
With friends	15	18	26	14
With both family and friends	6	8	10	6
Total number in travel party				
1	17	14	13	19
2	26	26	29	24
3	18	16	16	19
4	13	12	14	10
5	12	14	11	13
6 or more	16	17	17	15
	#	#	#	#
Average number	3.3	3.4	3.3	3.2
Average number 18 years or older in travel party	2.8	2.8	2.9	2.8
Average number 13 to 17 years old in travel party	0.3	0.3	0.3	0.3
Average number under 13 years old in travel party	0.4	0.5	0.4	0.4

Although members of the three prospect groups are more likely to have visited Canada in the past three years, they do not mention Canadian destinations to a higher extent than other vacation destinations when asked to name places that they might vacation in the next two years. Neither do the Canadian places mentioned by the prospect groups differ from those mentioned among all potential travellers.

These next two tables do provide a measure of the awareness among the parks prospect groups of destinations in Canada. Mentions have been grouped to conform with the five Parks Canada regions.

ALL PLACES ANYWHERE MIGHT VISIT IN NEXT TWO YEARS BY PARKS CANADA PROSPECTS

	Total	VISITED: National park	VISITED: Resort & wilderness area	Historic buildings very important
Total mentions (100%)	5234	1271	598	1871
	%	%	%	%
Conterminus U.S.A.	69	70	68	67
South-west	28	28	31	24
South-east	17	17	15	17
Florida	10	14	9	9
North-west	8	10	10	8
North-central	4	5	4	5
North-east	11	11	9	12
Hawaii	7	8	6	6
Alaska	1	2	3	2
Continental Europe	7	6	6	8
Canada	6	7	7	6
Caribbean and Bermuda and Bahamas	4	3	3	3
Mexico	3	3	3	3
Other countries	9	4	5	5

ALL INITIALLY MENTIONED PLACES IN CANADA* MIGHT VACATION BY PARKS CANADA PROSPECTS

	Total	VISITED: National park	VISITED: Resort & wilderness area	Historic buildings very important
Total initial mentions (100%)	5026	1224	592	1902
	%	%	%	%
Atlantic provinces	8	8	7	8
Quebec	33	32	31	33
Montreal	17	16	16	16
Other Quebec mentions	16	16	15	17
Ontario	32	31	31	32
Toronto	12	11	12	11
Niagara/International Falls/ Peace Gardens	7	6	6	8
Ottawa	2	3	3	2
Other Ontario mentions	11	11	10	11
Prairies and north	6	7	5	7
Manitoba	3	3	3	3
Winnipeg	2	2	2	2
Other Manitoba mentions	1	1	1	1
Saskatchewan	2	3	1	2
Yukon/Northwest Territories mentions	1	1	1	1
West	22	23	27	21
Alberta	10	10	12	10
Banff	2	3	2	2
Calgary	3	2	3	3
Lake Louise	2	2	3	2
Other Alberta mentions	3	3	4	3
British Columbia	12	13	15	11
Vancouver	6	6	7	4
Victoria	2	2	3	2
Other British Columbia mentions	4	5	5	5

* Mentions without prompting

This table shows the places within Canada which have been visited by the prospect groups in the past three years.

- Ontario is the most frequently visited destination.
- Travellers placing importance on historic buildings are more likely to have visited Quebec on past vacations.
- Members of the national park and resort/wilderness area prospect groups are more likely to have visited Western Canada.

PLACES BEEN TO IN CANADA IN PAST 3 YEARS
BY PARKS CANADA PROSPECTS

	Weighted total	VISITED: National park	VISITED: Resort & wilderness area	Historic buildings very important
Total respondents (100%)	2001	477	215	710
	%	%	%	%
Been to Canada in past 3 years	24	30	36	27
Total mentions (#)	987	341	174	422
Atlantic provinces	6	7	6	6
Quebec	22	19	19	[25]
Montreal	12	11	12	13
Other Quebec mentions	10	8	7	12
Ontario	43	39	39	41
Toronto	12	10	13	11
Niagara Falls	9	6	4	10
Ottawa	1	1	2	1
Other Ontario mentions	21	22	20	19
Prairies and north	8	9	8	7
Manitoba	4	4	4	4
Winnipeg	2	1	2	2
Other Manitoba mentions	2	3	2	2
Saskatchewan	3	3	2	2
Yukon/Northwest Territories mentions	1	2	2	1
West	22	[27]	[29]	22
Alberta	8	10	10	9
Calgary	2	1	2	2
Banff	2	2	3	2
Lake Louise	1	2	2	2
Other Alberta mentions	3	5	3	3
British Columbia	14	17	19	13
Vancouver	5	6	8	5
Victoria	3	3	5	3
Other British Columbia mentions	6	8	6	5

This table presents four measures of potential for Canada as a vacation destination among the three prospect groups.

- All three prospect groups express greater interest in visiting Canada in the next three years than does the total sample of potential travellers.

- These three groups do not differ from the total sample in terms of their evaluation of Canada versus other destinations for the kinds of things they like to do most on a vacation.

- The three prospect groups have higher Canadian vacation potential, especially the resort/wilderness group.

- As seen in the profile of past short and vacation trips, a greater percentage of the three prospect gropus have visited Canada.

CANADIAN VACATION POTENTIAL
BY PARKS CANADA PROSPECTS

	Total	VISITED: National park	VISITED: Resort & wilderness area	Historic buildings very important
Total respondents (100%)	2001	477	215	710
	%	%	%	%
Interest in visiting Canada in next two years				
Very interested	28	36	44	36
Somewhat interested	39	40	33	37
	67	76	77	73
Not interested	34	25	22	27
Comparison of Canada to other places for things like to do most on a vacation				
Canada better	37	37	38	38
Canada same	41	40	41	37
Canada not as good	6	4	4	5
Don't know	17	18	17	20
Canada vacation potential				
High	33	41	49	41
Medium	31	33	30	30
Low	36	27	21	30
Whether been to Canada				
Ever been	56	58	63	60
Been in past three years	24	30	36	27
Never been	44	43	37	40

There is little differentiation among the prospect groups in terms of demographics with the exception that members of the historic sites prospect group tend to be older.

Methodological Note: A significantly higher proportion of potential travellers in the sample are female. This could be due to higher life span and higher propensity to travel among females. In order to ensure that this potential bias was not influencing results reported, cross-tabulation analysis was performed weighting the male:female ratio to 50%:50%. No differences were evident, and all reported findings are unweighted by sex.

DEMOGRAPHIC PROFILE
BY PARKS CANADA PROSPECTS

	Total	VISITED National park	VISITED Resort & wilderness area	Historic buildings very important
Total respondents (100%)	2001	477	215	710
Region of residence	%	%	%	%
South-west	27	26	23	30
South-east	12	10	11	14
North-west	8	10	9	6
North-central	24	25	25	22
North-east	30	30	32	28
Area of residence				
Countryside	16	17	15	15
Small town	37	39	35	41
Large city	19	19	19	18
Suburbs of large city	28	25	31	26
Employment				
Full time	49	50	51	45
Part time	14	14	13	15
Not at all	37	36	36	40
Education				
High school or less	37	37	39	39
Any college	63	63	61	61
Age				
Under 35 years	40	44	44	(31)
35 - 54 years	34	29	28	34
Over 54 years	26	27	28	[35]
Sex				
Male	39	42	46	37
Female	61	59	54	63
	#	#	#	#
Respondents answering	1829	432	204	653
Household income (1981)	%	%	%	%
$20,000 or less	29	30	26	30
$20,000 - $30,000	27	32	27	26
$30,000 - $40,000	23	22	24	22
Over $40,000	22	18	22	22
Personal association with Canada				
Relatives or friends currently live in Canada	14	18	17	16
Self, relatives or friends used to live in Canada	11	10	13	10
Self, relatives and friends never lived in Canada	75	71	70	74

This table shows each prospect groups' preferences in implementing and arranging their vacations. Shown are the percentages within each group strongly agreeing with each statement. Few differences are evident, with the following two exceptions.

- Members of the resort/wilderness prospect group show less concern that the people encountered while on vacation speak English.

- The historic site prospect group is more apt to have their vacation arranged before leaving home and is more cautious while on vacation. This group also wants to have a range of options in terms of transportation modes available to them.

VACATION ATTITUDES
BY PARKS CANADA PROSPECTS
(% strongly agreeing)

	Weighted total	VISITED: National park	VISITED: Resort & wilderness area	Historic buildings very important
Total respondents (100%)	2001	477	215	710
	%	%	%	%
Vacations are mainly for rest and relaxation	59	61	59	59
Vacations are for getting out and doing lots of different things	52	57	57	60
Important that people you encounter on a vacation understand English	41	36	(33)	42
Like to make all arrangements before you go on vacation	46	42	40	[49]
Like to make arrangements as you go along on your vacation	21	26	22	24
Like to go to a different place on each new vacation	34	36	38	39
Often go back to vacation places you have been to before	33	32	31	33
Have to be more cautious when on vacation than when at home	33	35	31	[40]
In any one year would rather take a number of short vacations instead of one long vacation	32	30	28	36
Like the idea of paying one price that covers both transportation and accommodation	29	25	30	34
Don't have to spend a lot of money to enjoy a vacation	54	56	54	61
Think it's worth paying more to get luxuries and extras on a vacation	18	14	13	20
Importance of ...				
Being able to get there by car	41	43	42	[50
Being able to get there by bus or train or plane	40	36	40	47
A package trip which includes both transportation and accommodation	28	27	31	35]

The vacation benefits sought by each of the Parks Canada prospects are shown in this table.

- All travellers want value for their vacation dollar and many different things to see and do. They also want to meet friendly local people, and get good service.

- The benefits of importance to the national park prospects and the resort and wilderness prospects are very similar. Members of both these groups want wilderness, national parks, lakes and streams, mountains, countryside, and small towns. It is not surprising that travellers having visited national parks place importance on national parks, but this benefit is important to the resort/wilderness group also.

- Somewhat surprisingly, the resort and wilderness area prospect group does not place any greater importance on resort areas than the average U.S. traveller. Rather, it is the wilderness setting that is of more importance to this group.

- The historic sites prospect group, in addition to seeking those benefits sought by the other two prospect groups, wants cultural activities, historic buildings and opportunities to shop. This group also places greater importance on high quality restaurants, first class hotels, cosmopolitan atmosphere and big cities than do the other two prospect groups.

VACATION BENEFITS
BY PARKS CANADA PROSPECTS
(% saying benefit very important)

	Weighted total	VISITED: National park	VISITED: Resort & wilderness area	Historic buildings very important
Total respondents (100%)	2001	477	215	710
	%	%	%	%
Value for your vacation dollar	76	75	79	79
Having many different things to see and do	60	61	64	71
The friendliness of local people	66	67	71	78
Getting good service	75	71	71	78
High quality restaurants	42	38	36	49
First class hotels	34	26	28	42
Smaller towns	23	28	29	41
Countryside	50	60	64	66
Oceanside	45	45	47	60
Lakes and streams	38	46	48	54
Mountains	35	46	47	53
National parks and forests	35	50	45	56
Wilderness	29	41	44	42
Resort areas	23	23	28	28
Nightlife and entertainment	25	22	29	27
Cultural activities	31	29	33	60
Historic buildings	36	41	42	100
Cosmopolitan atmosphere	13	12	12	21
Shopping	23	19	19	34
Big cities	12	12	8	19

The next three tables examine the importance of vacation benefits in conjunction with the perception of Canada vis-a-vis other vacation destinations on these same benefits. Simultaneous consideration of both perspectives is required to fully address the current and potential likelihood that members of the three groups identified as Parks Canada prospects will choose Canada as their vacation destination.

If Canada is rated as better than other vacation destinations on the benefits also rated as important by a U.S. traveller Canada would be the destination this traveller would likely choose. However, if Canada is rated as the same as other destinations on important benefits the choice of Canada would be a chance occurrence, dependent on awareness of potential destinations in Canada and other factors unrelated to vacation benefits sought. Canada would be eliminated if perceived as not as good as other vacation destinations on important attributes. Finally, if Canada is not known on benefits of importance the potential traveller requires additional information, but is not likely to travel to Canada before obtaining this information.

- The benefits of importance to the national parks prospect group are shown in this table. Two-fifths of the group feel Canada can deliver countryside, lakes and streams and wilderness better than other destinations. Just one-quarter of these travellers having visited national parks on previous vacations feel Canada's national parks are better than other destinations.

- The benefits sought by the resort and wilderness area prospect group are shown here. Approximately one-third to one-half of this group rate Canada is better than other destinations on the benefits of importance. Although this group does not place

greater importance on resort orders than do U.S. potential travellers in general, it is worth noting that only 13 percent of this group feels that Canada's resort areas are better than resort areas provided by other vacation destinations.

- The benefits of high importance to the historic buildings prospect group are shown here. A large part of this group feels that Canada can supply countryside, lakes and streams and wilderness better than other destinations. However less than one-quarter rate Canada as better for a smaller town, oceanside, cultural activities or historic building. Also, only 15 percent feel Canada provides better shopping opportunities than other destinations.

BENEFIT IMPORTANCE AND CANADA'S PERFORMANCE FOR NATIONAL PARKS PROSPECT GROUP

% of total sample indicating that ...	BENEFIT IS VERY OR SOMEWHAT IMPORTANT AND ... Canada better	Canada same	Canada not as good	Canada not known	Total important
Value for your vacation dollar	38	32	14	10	93
Having many different things to see and do	23	53	10	7	93
The friendliness of the local people	28	51	10	8	96
Getting good service	21	60	5	10	96
High quality restaurants	13	43	9	9	74
First class hotels	9	41	5	8	65
Smaller towns	18	48	8	6	79
Countryside	40	46	3	6	95
Oceanside	12	33	28	12	85
Lakes and streams	44	36	3	7	90
Mountains	30	41	7	7	85
National parks or forests	27	43	7	12	89
Wilderness	41	26	1	6	74
Resort areas	13	36	9	8	65
Nightlife and entertainment	9	37	9	4	59
Cultural activities	18	48	7	6	79
Historic buildings	17	50	11	10	87
Cosmopolitan atmosphere	10	31	4	5	51
Shopping	14	36	9	6	63
Big cities	9	27	5	3	45

BENEFIT IMPORTANCE AND CANADA'S PERFORMANCE FOR RESORT AND WILDERNESS AREA PROSPECT GROUP

% of total sample indicating that ...	BENEFIT IS VERY OR SOMEWHAT IMPORTANT AND ... Canada better	Canada same	Canada not as good	Canada not known	Total important
Value for your vacation dollar	42	32	13	8	95
Having many different things to see and do	24	55	9	5	93
The friendliness of the local people	29	50	12	6	97
Getting good service	22	61	5	9	97
High quality restaurants	16	42	3	8	74
First class hotels	13	38	5	10	65
Smaller towns	18	46	9	5	77
Countryside	38	49	3	5	94
Oceanside	14	37	28	11	90
Lakes and streams	48	37	1	5	91
Mountains	31	42	7	7	87
National parks or forests	29	43	6	8	86
Wilderness	45	27	1	5	78
Resort areas	13	46	8	8	75
Nightlife and entertainment	10	41	12	6	68
Cultural activities	21	49	5	5	80
Historic buildings	17	56	10	8	91
Cosmopolitan atmosphere	14	31	4	3	52
Shopping	13	36	9	6	65
Big cities	10	30	6	1	47

BENEFIT IMPORTANCE AND CANADA'S PERFORMANCE FOR HISTORIC BUILDINGS PROSPECT GROUP

% of total sample indicating that ...	BENEFIT IS VERY OR SOMEWHAT IMPORTANT AND ... Canada better	Canada same	Canada not as good	Canada not known	Total important
Value for your vacation dollar	35	33	12	14	94
Having many different things to see and do	25	48	10	10	93
The friendliness of the local people	30	51	7	9	96
Getting good service	23	55	6	13	96
High quality restaurants	18	42	5	11	79
First class hotels	17	44	6	10	77
Smaller towns	20	46	8	11	85
Countryside	38	43	4	8	93
Oceanside	15	31	25	17	88
Lakes and streams	42	31	2	10	87
Mountains	30	36	7	10	82
National parks or forests	28	37	6	14	86
Wilderness	35	21	2	9	67
Resort areas	15	35	7	12	69
Nightlife and entertainment	10	34	8	8	60
Cultural activities	23	49	8	12	92
Historic buildings	24	51	12	14	100
Cosmopolitan atmosphere	12	35	6	7	60
Shopping	15	37	10	9	70
Big cities	11	30	7	6	53

This table examines multiple membership among the three prospect groups identified.

- Three-quarters of resort/wilderness area prospects are also prospects for national parks.
- Two-fifths of each of the national park and resort/wilderness area prospects are also prospects for historic sites.
- Historic sites prospects are not as likely to be prospects for either national parks or resort/wilderness areas.

	VISITED		Historic buildings very important
	National park	Resort and wilderness area	
	477	215	710
	%	%	%
National park prospects	100	[75]	27
Resort/wilderness area prospects	34	100	13
Historic sites prospects	[41]	[42]	100
	#	#	#
Average number of prospect groups are member of	1.7	2.2	1.4

This chart describes the differences among the four benefit segments identified in the original analysis of the U.S. potential travellers study. In the following table, the Parks Canada prospects are crossed with these segments.

- One-half of both the national park prospect group and the resort/wilderness group are members of the outdoor segment. Members of these two groups are less likely to be members of the resort segment.

- Those travellers among whom historic buildings are very important are more likely to be members of the touring segment or the urban segment.

DIFFERENCES AMONG VACATION BENEFIT SEGMENTS

SEGMENT	URBAN	RESORT	TOURING	OUTDOOR
SIZE	17%	31%	20%	31%
attributes of proportionately greater importance ↑	Big cities Cultural activities Shopping	Nightlife/entertainment First class hotels High quality restaurants Resort areas	First class hotels High quality restaurants Smaller towns Historic buildings Countryside	Wilderness Mountains Lakes and streams National parks or forests Countryside
↓ attributes of proportionately lesser importance	Oceanside Mountains Lakes and streams Wilderness First class hotels High quality restaurants	National parks or forests Historic buildings Lakes and streams Countryside Mountains Smaller towns Wilderness	Nightlife/entertainment	High quality restaurants First class hotels

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BENEFIT SEGMENTS
BY PARKS CANADA PROSPECTS

	Total	VISITED: National park	VISITED: Resort & wilderness area	Historic buildings very important
Total respondents (100%)	2001	477	215	710
	%	%	%	%
Outdoor	31	[47]	[48]	30
Resort	31	18	21	14
Urban	17	15	14	[24]
Touring	20	21	17	[32]

PERFORMANCE SEGMENTS

PERFORMANCE SEGMENTS

The second analysis of the U.S. potential data set examined three of the four segments identified in the original analysis. The outdoor and touring segments strongly value the benefits that Parks Canada provides. In addition, Parks Canada facilities such as Waterton Lake would seem to appeal to members of the resort segment. These three segments were further segmented by the extent to which Canada is perceived to best provide these park benefits.

The following three charts describe the differences among the performance segments within each of the benefit segments, and the benefits entered into each analysis. These included those benefits of importance to the segment which Parks Canada can provide.

- The outdoor segment is comprised of three subsequents. The largest of these, consisting of 64% of the outdoor segment, feels Canada is somewhat better than other destinations for value, but not as good for oceanside. The remaining two groups are less apt to agree that Canada delivers value, but do feel that Canada's oceanside is to some degree better. Also, the second sub-segment identified feels Canada is better for historic buildings.

- The touring segment was segmented into four sub-segments based on their perception of Canada vis a vis other vaction destinations. The largest of these sub-segments (38%) rates Canada as better for historic buildings but not as good for oceanside. The second sub-segment feels Canada delivers oceanside, but not value or high quality restaurants. The third group rates Canada as better for value and oceanside, but not as good for mountains, lakes and streams or wilderness. The last group rates Canada as somewhat better for high quality restaurants, but not as good for historic buildings.

- The third segment with potential for Parks Canada offerings, the touring segment, was sub-segmented into four performance segments. The largest of these four sub-segments feels Canada is better for wilderness, but not as good for historic buildings. Another sub-segment rates Canada as poor for value, but somewhat better for resort areas. A third group rates Canada better than the other sub-segments for high quality restaurants, value, high class hotels and good service, but rates Canada not as well as the other sub-segments for national parks, lakes and streams, countryside, mountains or wilderness. The final group is positive toward Canada for historic buildings, and many things to see and do, but has a lower perception of Canada for lakes and streams.

PERFORMANCE SEGMENTS

OUTDOOR

(31% of sample)

Segment size	Group 1 N = 352 64%	Group 2 N = 112 20%	Group 3 N = 84 15%
Benefits rate Canada better relative to other groups ↑	Value	Historic buildings Oceanside	Oceanside
Benefits rate worse relative to other groups ↓	Oceanside	Value	Value

Parks Canada benefits entered into analysis

Value
Getting good service
Historic buildings
Countryside
Wilderness
Mountains
Oceanside
Lakes and streams
National parks and forests
Many things to see and do

PERFORMANCE SEGMENTS

TOURING

(20% of sample)

Segment size	Group 1 N = 133 38%	Group 2 N = 82 23%	Group 3 N = 53 15%	Group 4 N = 81 23%
Benefits rate Canada better relative to other groups ↑	Historic buildings	Oceanside	Value Oceanside	High quality restaurants
↓ Benefits rate worse relative to other groups	Oceanside	Value High quality restaurants	Mountains Lakes and streams Wilderness	Historic buildings

Parks Canada benefits entered into analysis

Value
High quality restaurants
High class hotels
Getting good service
Historic buildings
Countryside
Wilderness
Mountains
Oceanside
Lakes and streams
National parks and forests
Many things to see and do

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PERFORMANCE SEGMENTS

RESORT

(31% of sample)

Segment size	Group 1 N = 78 15%	Group 2 N = 104 20%	Group 3 N = 260 49%	Group 4 N = 84 16%
Benefits rate Canada better relative to other groups ↑	Resort areas	High quality restaurants Value High class hotels Getting good service	Wilderness	Historic buildings Many things to see and do
↓ Benefits rate worse relative to other groups	Value	National parks and streams Lakes and streams Countryside Mountains Wilderness	Historic buildings	Lakes and streams

Parks Canada benefits entered into analysis

Value for vacation dollar
High quality restaurants
Getting good service
Nightlife
Historic buildings
Countryside
Wilderness
Mountains
Oceanside
Lakes and streams
National parks and forests
Resort areas
Many different things to see and do

The next two tables profile the performance segments first by furthest destination on past vacation trips and, second, by Canadian vacation potential. These tables are provided to demonstrate how the extensive computer tabulations provided with this report can be used.

- Members of the touring segment with a better evaluation of Canada for value for their vacation dollar are more likely to have visited Canada on past vacation trips. Similarly, members of the outdoor segment having rating Canada's oceanside better are more likely to have visited Canada.

- Those travellers in the touring segment with a better perception of Canada's historic buildings express greater interest in Canada as a vacation destination.

- Members of the resort segment who feel Canada does not provide value rate Canada as not as good for the things they like to do on vacation.

The following legend is provided to assist in examining the performance segments.

HB - Historic buildings

OCSD - Oceanside

HQR - High quality restaurants

VAL - Value for vacation dollar

WLDS - Wilderness

MNT - Mountains

FURTHEST DESTINATION OF MINIMUM DISTANCE VACATION TRIPS BY PERFORMANCE SEGMENTS

		TOURING				OUTDOOR			RESORT			
Total respondents (100%)	Weighted total	+HB -OCSD	+OCSD -HQR -VAL	+VAL -WLDS	-HB	+VAL -OCSD	+HB -VAL	+OCSD -VAL	+RA -VAL	+HQR +VAL -MNT -WLDS	+WLDS -HB	+HB +things to do
	2001	126	88	52	83	326	106	94	78	109	264	84
	%	%	%	%	%	%	%	%	%	%	%	%
%	91	94	91	95	88	93	89	91	93	92	94	86
4+ night trip takers	#	#	#	#	#	#	#	#	#	#	#	#
#	1828	119	80	49	73	303	95	85	73	100	248	72
	%	%	%	%	%	%	%	%	%	%	%	%
Conterminus U.S.A.	71	72	76	72	74	77	72	57	66	64	69	65
Canada	5	3	5	12	5	7	10	12	5	4	3	6
Caribbean/Bermuda/ Bahamas	5	7	-	-	5	3	2	7	9	10	8	10
Mexico	4	6	4	-	4	2	3	8	5	5	5	5
British Isles	2	1	1	2	2	3	-	3	2	-	2	-
Continental Europe	5	2	3	4	5	2	10	5	6	8	4	1
Alaska	1	*	2	4	1	1	-	3	-	-	1	-
Hawaii	4	4	3	1	1	4	3	5	8	8	6	7
Other countries	3	4	6	6	4	2	*	1	-	2	4	5

CANADIAN VACATION POTENTIAL BY PERFORMANCE SEGMENTS

		TOURING				OUTDOOR			RESORT			
Total respondents (100%)	Weighted total 2001	+HB -OCSD 126	+OCSD -HQR -VAL 88	+VAL -WLDS 52	-HB 83	+VAL -OCSD 326	+HB -VAL 106	+OCSD -VAL 94	+RA -VAL 78	+HQR +VAL -MNT -WLDS 109	+WLDS -HB 264	+HB +things to do 84
	%	%	%	%	%	%	%	%	%	%	%	%
Interest in visiting Canada in next two years												
Very interested	28	[38]	37	22	21	34	29	37	18	28	25	33
Somewhat interested	39	29	32	39	47	41	42	37	27	34	45	43
Not interested	34	33	31	40	32	25	29	25	55	38	31	25
Comparison of Canada to other places for things like to do most on a vacation												
Canada better	21	28	25	30	24	25	29	36	14	21	17	26
Canada same	50	51	47	50	44	58	47	41	35	50	48	46
Canada not as good	20	18	22	18	28	12	18	18	[51]	24	33	23
Don't know	9	2	6	3	4	5	7	4	1	6	2	6
Canadian vacation potential												
High	33	42	39	39	31	38	37	49	17	30	27	39
Medium	31	24	30	21	31	38	31	27	28	27	33	31
Low	36	34	32	40	38	24	32	24	56	43	40	29
Whether been to Canada												
Ever been	56	67	64	78	50	60	64	57	52	58	60	54
Been in past 3 years	24	23	27	47	20	30	28	32	18	19	25	23
Never been	44	33	36	22	50	40	36	43	48	42	40	46

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APPENDICES

Evaluation of Kejimkujik visitor survey questionnaire

* Market segmentation - statistical methods

Market segmentation - statistical methods

Market segments described in this report were developed using Q-analysis, an application of factor analysis. Whereas traditional factor analysis utilizes correlations among variables to group variables which seem to describe the same underlying concepts, Q-analysis uses correlations among respondents to group respondents which are similar in some way.

In Q-analysis, a correlation coefficient is computed for each pair of respondents from their scores on a series of variables. Factor analysis is applied to the respondent-by-respondent correlation matrix to obtain factors or groups which describe hypothetical respondent "types". Respondents are then grouped according to the "type" to which each is most highly correlated. Each market segment consists of the respondents who are most highly correlated to a respondent "type" and least correlated to other respondent "types" based upon their scores on the variables used in the Q-analysis.

Q-analysis is only one of a variety of statistical methods used in segmentation research. The cited references provide a survey of available methods and a general discussion of segmentation research.

Both the Statistical Package for the Social Sciences (SPSS) and the Statistical Analysis System (SAS) contain routines for conducting cluster analysis. The routine provided in SPSS utilizes Q-types factor analysis and is described in the section on Factor Analysis, 2nd Edition.

The SAS routine performs a hierarchical cluster analysis based upon a distance matrix. Initially, one cluster is formed for each respondent. The two most similar to these single respondent clusters are then combined, and then the two most similar among these new clusters and so on. The SAS cluster procedure is described in the SAS Users Guide: Statistics, 1982 Edition.

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POOR

QUALITY

ORIGINAL